PERT Guide for Future CPA's

Effective April 1, 2023

CPA provincial / regional bodies	CPA PER contact information
CPA Alberta	email: practicalexperience@cpaalberta.ca phone: 403.269.5341
CPA Atlantic Region	email: practicalexperience@cpaatlantic.ca phone: 902.429.4494
CPA British Columbia	email: practicalexperience@bccpa.ca phone: 604.872.7222
CPA Canada — International	email: internationalinquiries@cpacanada.ca phone: 604.605.5084
CPA Manitoba	email: practicalexperience@cpamb.ca phone: 204.594.9022
CPA Ontario	email: practicalexperience@cpaontario.ca phone: 416.962.1841 or 1.800.387.0735 Mentor inquiries: mentor@cpaontario.ca
Ordre des comptables professionnels agréés du Québec	email : Stages@cpaquebec.ca phone: 1.800.363.4688 [2615]
CPA Saskatchewan	email: practicalexperience@cpask.ca phone: 306.359.0272
CPA Canada Toronto Head Office	email: member.services@cpacanada.ca phone: 416.977.0748 or 1.800.268.3793

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Overview

The CPA Certification Program

To complete the CPA Certification Program, future CPA's must satisfy three components [1]:

- CPA Professional Education Program (CPA PEP)
- Common Final Examination (CFE)
- CPA Practical Experience Requirements (CPA PER)

This document will provide guidance for future CPA's on completing reports in the Practical Experience Reporting Tool (PERT) in order to meet the requirements of the CPA PER.

Quebec Candidates: If you are reporting your experience in the Practical Experience Reporting Log (PERL), please visit Ordre Des Comptables Professionnels Agréés Du Quebec for your information.

CPA Practical Experience Requirements (CPA PER)

The CPA PER comprises the following elements:

1. Qualifying Experience: Gain relevant paid employment that is progressively complex

2. Appropriate Supervision: Supervisors, CPA mentors, program managers and program leaders will provide support throughout your practical experience

3. Reporting and Self-Assessment: Report work experience and self-assess on progress

4. CPA Mentorship: Meet with a mentor semi-annually to discuss your experience reports

5. Assessment by Profession: At key milestones, experience report(s) must be reviewed by the provincial/regional CPA body

Refer to the Practical Experience Requirements (CPA PER) and CPA Harmonized Practical Experience Policies for detailed requirements.

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1 Please refer to your provincial/regional body for the exact requirements.

CPA candidates

CPA candidates from the Western and Atlantic regions are eligible to begin reporting once they begin the CPA PEP.

CPA students

CPA students in Ontario are eligible to begin reporting once they are registered with CPA Ontario.

Future CPA's

For the purposes of this user guide, both candidates and students will be referred to as "future CPA's".

The Practical Experience Reporting Tool (PERT)

All future CPA's (excluding those in Quebec) are required to document their practical experience development in the Practical Experience Reporting Tool (PERT). This allows the CPA profession to track their progress and assess whether they have met the CPA Practical Experience Requirements (CPA PER).

In addition, CPA mentors, supervisors, program managers, program leaders and CPA reviewers also use PERT to support a future CPA's journey.

There are three key aspects for reporting your practical experience:

Getting Started	Semi-annually	When Required
Get approved to report in PERT	**Report your practical experience**	**Request a CPA Review**

- Set up your PERT Profile
- Document your employment
- Add your mentor

- Create reports
- Document your experience
- Meet with your mentor

- Get your experience reviewed by requesting a CPA Review of your experience reports

Experience Routes

Depending on your employer and employment position, a future CPA will be reporting through either the Pre-approved Program Route (PPR) or the Experience Verification Route (EVR).

Pre-Approved Program Route (PPR)	Experience Verification Route (EVR)
Employers offering pre-approved programs have worked with their respective provincial/ regional CPA bodies to design a program ensuring that the required experience can be met within 30 months.	This flexible, self-directed route allows future CPAs to gain practical experience from an employer of their choice. They must still be employed in a qualifying role, which is determined through a pre-assessment. There are more touchpoints throughout the journey and more guidance from a mentor is often needed as compared to a pre-approved program.
If you are employed in a pre-approved program, you must confirm your location, program, training position and mentor (who will have been allocated to you). Contact your program manager if you are unsure of the process.	If you are not employed in a pre-approved program, you must report your experience through EVR.

Unemployed

If you are unemployed (or your employment does not provide qualifying experience), select "Unemployed" as your experience route. When your situation changes, you will be able to update your experience route and begin reporting.

Future CPA's working in a co-op are considered "unemployed" while in school. However, there are some conditions in which an employer may allow them to remain "In Progress" on their roster (e.g. the national firms).

For more information on the two experience routes, please visit the practical experience overview webpage.

Create a PERT Profile

This section will provide guidance on how to get approved to begin reporting in PERT. All future CPA's must create a PERT profile, document their current employment and add a mentor before they can begin reporting experience in PERT.

Before you can begin, you must be registered with a provincial/regional CPA body and follow your provincial guidelines on how to create a PERT profile.

Click on your provincial/regional body:

CPA Atlantic School of Business or CPA International
CPA Western School of Business
CPA Ontario
CPA Quebec

CPA Atlantic School of Business

To report practical experience with CPA Atlantic School of Business Future CPA's must complete the following:

> ✓ Create your profile, indicating your experience route or identify as Unemployed.
>
> ✓ Add your mentor.
>
> ✓ Document your current employment information. Submit your employment information and wait to be approved for reporting
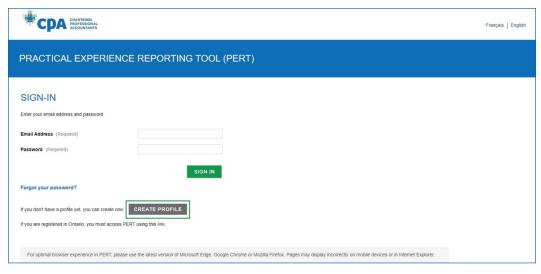
Create PERT Profile

1. Future CPA's for CPA Atlantic School of Business will receive an email when their PEP registration has been approved. By receiving this email, future CPA's can proceed with these steps.
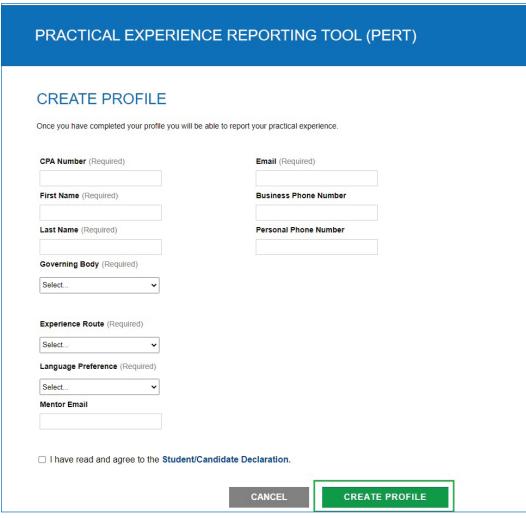
2. Go to pert.cpa-services.org/Student/Logon and click **CREATE PROFILE**.

3. Enter the required information.
    — Identify your Experience Route.
    — Add your mentor's email address. If you do not know your mentor's
       email address at this time, this field can be left blank and updated later.
    — click **CREATE PROFILE**. This action will send you an email with a link to
       set your PERT password.

4. Open the email and click the link to Set your password. Once you have
    created your password you will be redirected to the log in page of PERT.

Thank you for creating a profile in the CPA Practical Experience Reporting Tool (PERT).

Use the following link to create your password:

This link will expire on:

Sincerely,
PERT Administration

Log in to PERT

1. Enter your email address and password and click SIGN IN.

CPA CHARTERED PROFESSIONAL ACCOUNTANTS

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

SIGN-IN

Enter your email address and password

Email Address (Required)

Password (Required)

SIGN IN

Forgot your password?

If you don't have a profile yet, you can create one: CREATE PROFILE

If you are registered in Ontario, you must access PERT using this link.

For optimal browser experience in PERT, please use the latest version of Microsoft Edge, Google Chrome or Mozilla Firefox. Pages may display incorrectly on mobile devices or in Internet Explorer.

You will be redirected to your Home page.

Go to Document Your Current Employment section.

CPA Western School of Business

To get approved to report practical experience with the CPA Western School of Business, follow this checklist:

✓ Access the Practical Experience Orientation Webinar and pass the quiz.

✓ Log in to PERT indicate your experience route and add your mentor

✓ Document your current employment information.

✓ Submit your employment information and wait to be approved for reporting.

Practical Experience Student Orientation Course and Quiz

Future CPA's from the CPA Western School of Business are required to complete the Practical Experience Student Orientation Course Webinar and quiz.

1. Access the Practical Experience Student Orientation Course Webinar within Desire2Learn (D2L).
2. After completing the course, you must take a short quiz and achieve a passing score of at least 60% (multiple attempts are allowed).
3. Once you have passed the quiz, wait one business day.
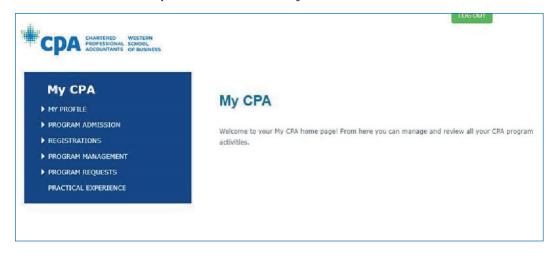4. After one business day you can create your profile.

Create PERT Profile

The information in your My CPA Portal is connected to your PERT profile.

1. Log in to My CPA Portal

2. Select **Practical Experience** from the *My CPA* menu.

3. Select **Click here to access PERT.**

4. Complete the required fields and click **CREATE PROFILE**. You will arrive at your home page.

Go to Document your current employment section.

CPA Ontario

To get started on reporting your practical experience with CPA Ontario, follow this checklist:

✓ Log in to PERT indicate your experience route and add your mentor.

✓ Document your current employment information.

✓ Submit your employment information and wait to be approved for reporting.

Create PERT Profile

The information in your CPA student portal is connected to your PERT profile.

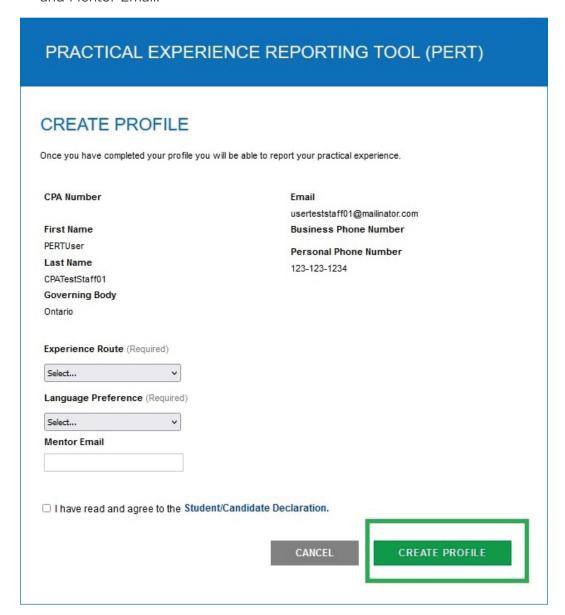1. Navigate to the CPA Ontario website. Navigate to the log In page and under CPA Ontario Students, select Access the Practical Experience Reporting Tool (PERT)

2. Enter your CPA Ontario ID and password associated with your My CPA Account and click **Login**.

3. The first time you log in, you will be asked to enter your Experience Route and Mentor Email.

PRACTICAL EXPERIENCE REPORTING TOOL (PERT)

CREATE PROFILE

Once you have completed your profile you will be able to report your practical experience.

CPA Number

First Name
PERTUser

Last Name
CPATestStaff01

Governing Body
Ontario

Email
userteststaff01@mailinator.com

Business Phone Number

Personal Phone Number
123-123-1234

Experience Route (Required)

Select...

Language Preference (Required)

Select...

Mentor Email

☐ I have read and agree to the Student/Candidate Declaration.

CANCEL   CREATE PROFILE

4. Click **CREATE PROFILE**

You will arrive on your Home page.

Go to Document Your Current Employment section

CPA Quebec

If you are reporting your practical experience in the Practical Experience Learning Log (PERL), contact Ordre Des Comptables Professionnels Agréés Du Québec.

Document your current employment (EVR)

This is your Home page if you had selected Experience Verification as your Experience Route.

Before you can report your practical experience, your employment must be assessed to determine that it is qualifying experience.
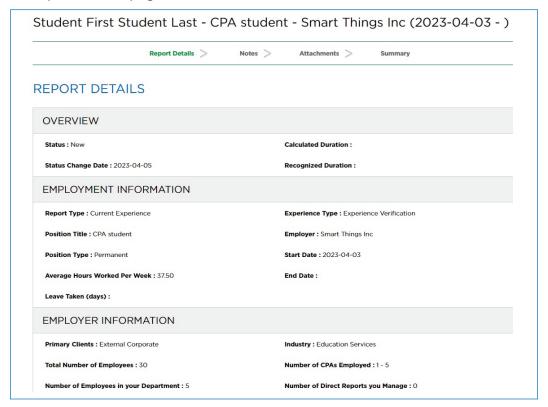
From your *Home* page:
1. Click **GET STARTED** on the Action Item DOCUMENT YOUR CURRENT EMPLOYMENT.
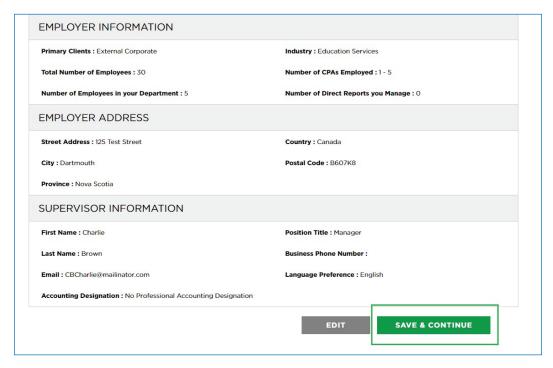
This will open a blank experience report.

If you are unsure of what any of the fields are, click on the question mark icon to get a description.

1. Enter the required information and click. Save. You will be navigated to the Report Details page

Student First Student Last - CPA student - Smart Things Inc (2023-04-03 -)

Report Details >   Notes >   Attachments >   Summary

REPORT DETAILS

OVERVIEW

Status : New

Status Change Date : 2023-04-05

Calculated Duration :

Recognized Duration :

EMPLOYMENT INFORMATION

Report Type : Current Experience

Position Title : CPA student

Position Type : Permanent

Average Hours Worked Per Week : 37.50

Leave Taken (days) :

Experience Type : Experience Verification

Employer : Smart Things Inc

Start Date : 2023-04-03

End Date :

EMPLOYER INFORMATION

Primary Clients : External Corporate

Total Number of Employees : 30

Number of Employees in your Department : 5

Industry : Education Services

Number of CPAs Employed : 1 - 5

Number of Direct Reports you Manage : 0

2. Click Save & Continue to navigate to the Notes page

EMPLOYER INFORMATION

Primary Clients : External Corporate

Total Number of Employees : 30

Number of Employees in your Department : 5

Industry : Education Services

Number of CPAs Employed : 1 - 5

Number of Direct Reports you Manage : 0

EMPLOYER ADDRESS

Street Address : 125 Test Street

City : Dartmouth

Province : Nova Scotia

Country : Canada

Postal Code : B607K8

SUPERVISOR INFORMATION

First Name : Charlie

Last Name : Brown

Email : CBCharlie@mailinator.com

Accounting Designation : No Professional Accounting Designation

Position Title : Manager

Business Phone Number :

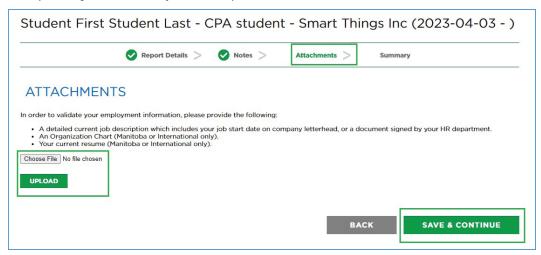**Language Preference :** English

EDIT   **SAVE & CONTINUE**

3. Click Save & Continue to navigate to the Attachments page

Student First Student Last - CPA student - Smart Things Inc (2023-04-03 -)

✓ Report Details >   Notes >   Attachments >   Summary

NOTES

Add Note

BACK   SAVE & CONTINUE
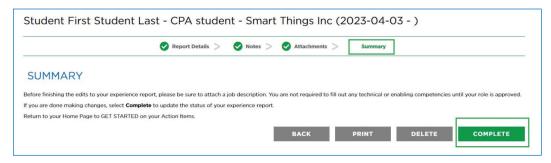
4. Attach a detailed job description which includes:
    a) Your employment start date
    b) Detailed outline of your specific duties/tasks performed within your position
    c) Company letterhead or signed by an appropriate supervisor/manager to be applicable

Note: If you are a Future CPA in Manitoba: you must also include a resumé and an organization chart on company letterhead.

5. Upload your current job description.

Student First Student Last - CPA student - Smart Things Inc (2023-04-03 -)

✓ Report Details >   ✓ Notes >   Attachments >   Summary

ATTACHMENTS

In order to validate your employment information, please provide the following:

- A detailed current job description which includes your job start date on company letterhead, or a document signed by your HR department.
- An Organization Chart (Manitoba or International only).
- Your current resume (Manitoba or International only).

Choose File   No file chosen

UPLOAD

BACK   SAVE & CONTINUE

6. Click Save & Continue

7. On the Summary page, click Complete

Student First Student Last - CPA student - Smart Things Inc (2023-04-03 -)

✓ Report Details >   ✓ Notes >   ✓ Attachments >   Summary

SUMMARY

Before finishing the edits to your experience report, please be sure to attach a job description. You are not required to fill out any technical or enabling competencies until your role is approved.

If you are done making changes, select **Complete** to update the status of your experience report.

Return to your Home Page to GET STARTED on your Action Items.

BACK   PRINT   DELETE   COMPLETE

This will navigate you back to your home page. You now need to submit your employment information.

Future CPA's in EVR are required to submit their employment information as a CPA Review.

Select GET STARTED on the action item SUBMIT YOUR EMPLOYMENT INFORMATION. This will navigate you to the CPA Review tab.

Complete the declarations and click REQUEST.

Once you have clicked Request, your employment report will be placed in queue to be reviewed by your regional CPA body. This is to determine whether you are employed in a qualifying role. You will be contacted if any further information is required.

Once your regional CPA body completes their review, you will receive an email with the results of your assessment and instructions for your next steps.

If you are employed in a qualifying role, your Reporting Status will update from "Pre-assessment Required" to "In Progress".

At this time, if you have a mentor identified on your profile and your employment has been approved you will activate a PER Start Date and can start reporting.

If you do not have a mentor identified at this time, you will not activate your PER start date and cannot start reporting.

Document your current employment (PPR)

This is your Home page if you had selected Pre-approved Program as your experience route.

Before you can report your practical experience, your employment must be assessed to determine that it is qualifying experience.

From your *HOME* page:

1. Select GET STARTED on the action item DOCUMENT YOUR CURRENT EMPLOYMENT.

This will open a blank experience report.

2. Enter the required information and click **CREATE**.

(Tip: If you are unsure of what any of the fields are, click on the *to get a description.)*

3. You will be navigated to the Report details page Click Save & Continue.

4. On the Summary page, click Close.

This will navigate you back to your home page.

Once you have documented your employment information and added your mentor, your program manager will be able to confirm your employment in their program. There is no further action required.

For information on how to add a mentor, see section Adding a Mentor.

Once your program manager confirms your employment within their pre-approved program, your reporting status will update from "Pending Enrollment" to "In Progress" and you will activate a PER Start Date to begin reporting.

Adding your Mentor

Future CPA's must be mentored throughout their practical experience journey. You cannot begin reporting until you have entered a mentor into your PERT profile.

When you log in to PERT, select the action item ADD YOUR MENTOR to enter your mentor's email address.

PPR: You must be mentored by CPA's from your PPR organization. Your program manager should provide you the details of your mentor.

EVR: You can be mentored by any CPA member in good standing. If you do not know any CPA members in good standing, you can use the Mentor Match Portal to search and reach out to an approved mentor.

Mentor Match Portal

The Mentor Match Portal is where mentors have offered to support future CPA's who do not know any CPA members willing to be their mentor.

The mentors in the portal have provided some information (level of experience, years of experience, biography) to help you in your search. Use this information to find a mentor who matches your situation and/or you believe would be a good mentor for you.

If you need help finding a mentor, click GET STARTED on the action item FIND A MENTOR, or click MENTOR SEARCH, which will take you to the Mentor Match Portal (if you do not have access to the Mentor Match Portal, contact your provincial/regional CPA body).

Using the search criteria, narrow your search, then read their bio to identify a match. Once you have chosen a mentor, click **SEND REQUEST** to trigger an email notification to this mentor.

The email notification contains very little information about you (name and email). However, the mentor can request more information before accepting the request to mentor you, so expect your provincial/regional CPA body to contact you asking for more information (employment history, education, hobbies, etc.).

If the mentor accepts your request, they will automatically be added to your PERT profile.

If the mentor does not accept your request, you will receive an email and be able to select a different mentor. If it takes longer than five days for the mentor to respond, the portal will automatically re-open for you and you will be able to select a different mentor.

Reporting your Practical Experience

Once approved to report experience from a qualifying role, all future CPA's are required to report their practical experience at least semi-annually (I.e. once you have a PER Start Date, experience must be reported every six months).

PER Start Date:

✓ Prior Experience

✓ Set your next Experience Report

Semi-annually:

✓ Report your Current Experience

✓ Meet with Mentor

When required:

✓ Verify report

✓ Request CPA Review

Current Experience

All future CPA's are required to report their practical experience and meet with their mentor approximately every six months from their PER Start Date to discuss your experience reports.

Prior Experience

Prior experience is for experience gained before your PER Start Date. Depending on when your PER Start Date is, you may need to report a portion of your current role in a prior experience report.

You can also report experience from a previous role, as long as it will demonstrate at least one level one sub competency and is for at least three months duration.

A maximum of 12 months of prior experience can be recognized towards your duration requirement.

In some circumstances, there may be a fee to have your prior experience recognized.

See section 2.5.9.1 of the CPA Practical Experience Requirements (CPA PER) for more information.

To Report your Experience:

1. Go to your Experience Reports page

2. Click **CREATE REPORT** to generate a new (blank) experience report.

3. Select your Report Type

Prior PPR is experience that you gained **<u>before</u>** your PER Start Date while working within a PPR. Your Program Leader will need to certify this experience.

Prior EVR is experience that you gained **<u>before</u>** your PER Start Date outside of a PPR.

(Note: A prior report cannot have an end date after your PER Start Date. If you are still employed in this role, input the end date as the day before your PER Start Date and create a separate current report.)

Current Experience is experience that you gain after your PER Start Date

1. Complete the required fields.

2. Click SAVE

3. This will create your report. You will navigate to the Report Details page within your new experience report.

4. Click Save & Continue to advance to the Technical Competency page.

Reporting your Technical Competencies:

PPR:

Displayed you will find your technical competencies relevant to your Pre Approved program. Select a self-assessed proficiency value for all populated sub-competencies. Select level 0 if you have had no exposure to a particular sub-competency during this reporting period.

To expand on a competency area, click "+".

For further information use the (?) for additional guidance.

Once finished click save & continue to report your enabling competencies.

EVR

Displayed you will find a total of six technical competency areas, each containing three or four sub-competencies. You are only expected to complete the sub-competencies that are relevant to your experience for this reporting period.

It is not realistic or expected that you would demonstrate proficiency in all competency areas.

Using the table to choose which competency areas are relevant to your experience by selecting Yes or No.

By selecting No, those competency areas will not appear in this experience report. You can update your No selection to Yes at any time. Once a competency section is saved, the Yes selections response cannot be edited.

Click "+" to expand on a competency area

Use the (?) for additional guidance.

Once finished click save & continue to report your enabling competencies.

Reporting Your Enabling Competencies

There are five competency areas containing three-part questions. You are not expected to document all five enabling competencies semi-annually. Only document the enabling competencies that most reflect your professional development obtained during this reporting period. Click "+" to expand on a competency area.

Once finished click save & continue.

Notes & Attachments

Use these sections to provide additional details if applicable.

Otherwise Save & Continue to the Summary page.

If you are done making changes, select Complete to update the status of your experience report.

Future CPA's who are reporting pre-approved program that is not a secondment type experience, will have their report status updated to Verified, as supervisor verification is not a required step.

Future CPA's who are reporting pre-approved program that is not a secondment type experience, a verified report enables you to:
• Request a mentor meeting
• Enter a date for your Next Experience Report Date

Return to your Home Page to GET STARTED on your Action Items.

Future CPA's who are reporting experience verification type experience or a secondment in a pre-approved program, will require supervisor verification after clicking complete.

Future CPA's who are reporting experience verification type experience or a secondment in a pre-approved program, a Completed report enables you to:
• Request a mentor meeting
• Send your experience report to your supervisor
• Enter a date for your Next Experience Report Date

Return to your Home Page to GET STARTED on your Action Items.

How to set your Next Experience Report Date

Your Next Experience Report Date will trigger a reminder for you to report your experience in PERT. Once you have a PER Start Date, it is automatically set for six months later, but you can change it at any time.

In addition, each time you complete an experience report, the date will be removed so you can set a new date of your choice.

To change the date:

1. Either click GET STARTED on the action item SET YOUR NEXT EXPERIENCE REPORT DATE or click VIEW PROFILE.

2. Click EDIT.

3. Enter the date you would like to next report your experience.

(Tip: Keep in mind that you are required to report semi-annually. If you have a Next CPA Review date, ensure you report your experience before then.

Suggestions:
1. *Set the date to be five/six months from your current date.*
2. *Set the date to be one-month before your Next CPA Review date.*
3. *Set the date to line up to your next performance review.*
4. *Set the date to line up with your contract-end date.)*

Supervisor Verification

All experience reports must be verified before they can be reviewed by your provincial/regional CPA body. Once your report has been verified, you can re-open it and make changes, but these changes must be verified again.

PPR experience reports that are non-secondment will have their report automatically set to verified upon clicking Complete on the Summary page of an experience report.

EVR reports (and **PPR secondment** reports) must be verified by a supervisor.

Your supervisor must hold a position senior to you (direct supervision is preferred), and be able to verify that your reported work experience is accurate for the report period. Your supervisor does not need to be CPA.

When you create your experience report, you will enter your supervisor's email address.

If this email address is not a business (corporate) email address, you may need to attach confirmation that this supervisor is/was your supervisor during the report period. In this case, your report status will update to Admin Assess after your supervisor has completed their verification and you may be contacted if further information is needed from you.

Examples of confirmation (if required):
- Your job description containing your job start (and end) date and the name of your supervisor.
- A letter from HR (or senior management) confirming you reported to the supervisor for the report period.

Experience reports requiring supervisor verification will have a corresponding action item on the home page instructing you to send the report for Supervisor Verification.

Click GET STARTED on Send your Experience Report for Supervisor Verification

click **SEND TO SUPERVISOR** on the Report Details tab of your experience report.

This will trigger an email to be sent to your supervisor with a link to your experience report and instructions on how to verify.

The link will be active for 30 days. If your supervisor does not verify your report within the 30 days, this link will expire. You will be notified by email and you would have an action item on your Home page indicating that your Supervisor Verification has expired. Click GET STARTED to send your report to your supervisor again.

Once your report(s) have been verified, you can request a CPA Review if necessary.

Mentor Meetings

Future CPA's are required to report at least two mentors meetings for every 12 months of current experience. If you have not reported the minimum mentor meetings, you will be required to complete an additional 30 days of duration for every missed mentor meeting.

Mentor meetings are an opportunity for you to discuss your development with a CPA and you meet with your mentor each time you update your experience report.

From your *Home* page:

1. Click GET STARTED on your action item SCHEDULE YOUR MENTOR MEETING

2. You will be navigated to your *Mentor Meetings* page.

To schedule a mentor meeting you need to have:

✓ at least one completed experience report

✓ a mentor added to your PERT profile

✓ no other active mentor meeting requests

✓ a Reporting Status of "In Progress"

3. Click **REQUEST MEETING**.

This will take you to a page where you can request your meeting.

4. Click **REQUEST**.

This will send your mentor an email, letting them know you are ready to discuss your experience reports. **Note that this is not a calendar invitation**. You must contact your mentor directly to schedule a date.

After the meeting, your mentor will need to log in to PERT and complete the meeting. This should be done within one week, so follow up with them if they have not done this.

Reporting co-op experience

It is recommended that you begin reporting experience once you are a full-time hire. If you have gained experience from a co-op prior to your PER Start Date, this can be reported in a prior experience report(s).

Reporting experience in public practice

Future CPA's working in public practice are required to attach a chargeable hours form (signed by the designated member/program leader). CPA reviewers will use this to confirm that the hour requirements were met or to support the competency development reported.

To attach your chargeable hours form:

1. Download your chargeable hours form from the *Resources* page in PERT

   (Note that each region/province has its own specific form)

2. Complete the form.

3. Attach your chargeable hours form to your latest experience report using the attachments tab.

4. Request a CPA Review

Edit an existing report

You can make edits to an existing report. However, note that:

- If you make changes to a report that has been verified, these changes must be re-verified.
- You cannot re-open/edit a report that is in reviewed status.
- If you have had a significant change in your employment (change in program, location, organization, or a lateral move where your job duties have completely changed) you will need to report a change of job.

To update an existing report:

1. Click **VIEW** to open your existing report.

2. Click **RE-OPEN** to open your report for editing (the report status will update to follow-up).

3. To update your *Report Details* page, click **EDIT**

4. Follow the steps to Reporting your Technical Competencies and Enabling Competencies

CPA Reviews

To have your experience recognized, your experience reports must be reviewed by your provincial/regional CPA body.

30 days prior to your Next CPA Review date, or if your consolidated summary reflects that you have "Met" all the practical experience requirements, or if you have changed jobs, you are required to request a CPA Review.

During the review, the CPA reviewer will assign the appropriate proficiency (CPA Reviewed Proficiency) and provide notes under the relevant competency area. They may not agree with your self-assessed proficiency level and/or may ask for additional information on your report(s).

If they do not follow-up with any required changes from you, your report will be set to "Reviewed" status. Reviewed status means that your report cannot be re-opened and edited.

There are five types of CPA Reviews:

12-Month CPA Review

Required for EVR: Your Next CPA Review date will have been set by the CPA reviewer as either 12 months from your PER Start Date, or 12 months from your job start date. This is to encourage you to send your experience reports for a CPA Review once you have 12 months of experience. The CPA reviewer will identify whether you are on-track to complete your practical experience requirements.

Student Requested CPA Review

Student requested CPA Reviews should primarily be used if you have prior experience from a different employer.

If you are PPR and you have prior reports from a different PPR (or prior EVR reports) you must have these reports reviewed before you can have your current reports reviewed.

Change of Job CPA Review

If you have changed jobs while reporting practical experience, you will need to send your experience reports in for a Change of Job CPA Review. You must do this within 90 days of your job change.

Completion CPA Review

If your Next CPA Review is Upon Completion, you are not required to request a CPA Review until your consolidated summary reflects that you have "Met" all the practical experience requirements. As soon as your consolidated summary reflects that you have met the requirements, you will receive an action Item: COMPLETION REVIEW DUE.

Profession Requested CPA Review

If none of the above fits your situation and the CPA reviewer has specifically requested for you to request a CPA Review (they will have provided comments in the results of your last review with specific information), select Profession Requested CPA Review.

Requesting a CPA Review

Before you request a CPA Review, ensure your experience reports are fully up to date.

If you have the action item CREATE/UPDATE YOUR NEXT EXPERIENCE REPORT, complete this first.

Once your experience reports are up to date and are in verified status (and your mentor meetings have been documented):

1. Either: Click GET STARTED on the action item CPA REVIEW DUE (or COMPLETION REVIEW DUE) or;

    Navigate directly to the CPA Reviews page.

2. Click **REQUEST CPA REVIEW**.

3. Identify your review reason (and PPR, identify your program leader).

4. Complete the declaration(s) and click REQUEST.

EVR: This will send a request to your provincial/regional body to review your verified reports.

PPR: This will send a request to your program leader (or program manager if the status is data check, then on to your program leader) for their sign off. Once your program leader has signed off, the request will be sent to your provincial/regional CPA body.

Additional Information Required

If the CPA reviewer does not agree with your self-assessed proficiency level, but thinks you are close or missing more detail in your responses, they may ask for additional information.

You will receive an email notification and you must review the suggestions and re-submit your CPA Review within 30 days or the CPA Review will be cancelled.

From your *Home* page:

1. Click GET STARTED on the action item ADDITIONAL INFORMATION REQUIRED.

You will be navigated to the *CPA Reviews* page.

HOME   EXPERIENCE REPORTS   CONSOLIDATED SUMMARY   MENTOR MEETINGS   **CPA REVIEWS**

CPA REVIEWS

To have your competencies recognized toward meeting the Practical Experience Requirements, your experience reports must be reviewed by the CPA profession. Only verified experience reports can be reviewed.

Select Request CPA Review if your experience reports:

- accurately reflect experience gained to date
- have required documents attached
- have been verified.

REQUESTED	COMPLETED	STATUS	
2020-12-08		Follow-Up	VIEW

To request a CPA Review:

- Reporting status must be In Progress.
- You must have at least one verified report.
- You must not have any other CPA Reviews outstanding.

2. Click **VIEW** on the CPA Review that is in "Follow Up" status.

3. Read the comments provided by the CPA reviewer and follow their instructions.

CPA REVIEW

Type	Assessment
Review Reason	Completion Assessment
Review Reason Details	
Status	Follow-Up
Date Created	2023-01-20
Program Manager Comments	
Program Leader Comments	
CPA Review Comments	To self-assess the enabling questions at a level 2, in addition to identifying the CPA value most applicable to the situation, you also need to clearly identify the alternatives you considered (minimum of two) as well as identify the pros and cons of each one. Once you have amended your report, resubmit both your report and CPA Review.

CPA ADMINISTRATORS ONLY

Pre-Approved Program Leader Declaration

Date/Leave Declaration	Agree
Mentor Meeting Declaration	Agree
All 30 month Declaration	Agree
Not all 30 month Declaration	Unanswered
Departed Declaration	Unanswered
Certified By	Fake PL17567

RE-SUBMIT   VIEW CPA REVIEW SUMMARY

4. Click VIEW CPA REVIEW SUMMARY to see a summary of the reviewer comments and identify the areas requiring your attention. Click the report link under the Technical or Enabling Competency section to be taken to the appropriate section of the experience report for revision.

These instructions will generally ask you to go to your experience report(s), navigate to specific competencies (or check them all), read the Reviewer Notes and apply the suggested changes.

5. Apply the suggested changes and verify the reports again (if required).

6. When you are ready, click on the action item ADDITIONAL INFORMATION REQUIRED again.

ADDITIONAL INFORMATION REQUIRED ⓘ

We require additional information to complete your CPA Review. Open your latest CPA Review to see the comments, update your experience report(s) and click Re-submit.

Mar 15, 2023   **GET STARTED**

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7. Click **VIEW** to open the CPA Review that is in "Follow Up" status.

8. Click **RE-SUBMIT**.

RE-SUBMIT   **VIEW CPA REVIEW SUMMARY**

This will send your experience reports back to the CPA reviewer.

CPA Review Completed

You will receive an email notification when the CPA Review is completed. Check the Reviewer comments for information on next steps.

You can log into PERT to view a summary of the CPA Review including any comments on the technical and enabling competencies. In the CPA Reviews tab, click VIEW to open the CPA Review that is in Completed status, then click VIEW CPA REVIEW SUMMARY REPORT.

Glossary

These definitions are found in the CPA Practical Experience Requirements (CPA PER); they are not intended to modify or interpret provincial/regional CPA regulations or bylaws.

Autonomy:
The degree of independence CPA students/candidates assume in carrying out a task. See also *Circumstance* and *Complexity*.

Breadth:
The requirement for CPA students/candidates to gain proficiency in at least eight technical competency sub-areas, of which four must be at Level 2 proficiency and the remaining four at least at Level 1 proficiency. See also *Depth*, *Core*, *Competency sub-area and competency statements* and *Proficiency level*.

Chargeable hours:
Hours supervised (directly or overall) by a CPA registrant that are normally chargeable to clients. Chargeable hours do not include time spent on "work of a routine clerical nature."

Circumstance:
Situations are either routine or non-routine in nature. See also *autonomy* and *complexity*.

Routine — Circumstances typically encountered by and requiring the knowledge expected of newly certified CPA's.

Non-routine — Circumstances not typically encountered by newly certified CPA's; may require advanced technical expertise.

Competency area:
One of the 11 competency areas defined in The CPA Competency Map. There are six technical competency areas: Financial Reporting, Management Accounting, Taxation, Strategy and Governance, Finance, and Audit and Assurance; and five enabling competency areas: Professional and Ethical Behaviour, Problem-Solving and Decision-Making, Communication, Self-Management, and Teamwork and Leadership. See also *Competency sub-area and competency statements*.

Competency sub-area and competency statements:
The specific technical competency statements are grouped into 20 competency sub-areas. Each competency area has between three to four competency sub-areas. See also *Competency area* and *CPA Competency Map*.

Complexity:
The degree of difficulty associated with the number and nature of interrelationships and ambiguities that must be considered simultaneously.

There are three levels of complexity:

Low complexity — Little difficulty is associated with a small number of straightforward and frequently encountered issues; may achieve competence relying on "rote" approach.

Moderate complexity — Medium difficulty is associated with a number of interconnections or variables that need to be considered simultaneously; circumstances may be less clear and require approaches that are not practiced frequently.

High complexity — Considerable difficulty is associated with a large number of interrelationships and ambiguities that must be considered simultaneously; often requires innovative approaches. See also *Autonomy* and *Circumstance.*

Core:
All CPA students/candidates must demonstrate technical proficiency in any three competency sub-areas, at least at Level 1 proficiency, in financial reporting and/or management accounting. See also *Breadth, Depth, Competency sub-area and competency statements*.

CPA:
Canadian Chartered Professional Accountant; while there are other international CPA designations, all references in this document refer to the Canadian designation.

CPA candidate:
Individuals who are registered with a provincial or regional body and:
- are enrolled in a CPA Professional Education Program (CPA PEP), either through the profession's CPA PEP or through an accredited graduate level program offered by a post-secondary institution; or
- have completed the CPA PEP modules and have yet to successfully complete the Common Final Examination (CFE), and/or their practical experience requirements.

Note that the terms "candidate" or "student" may be used by provincial/ regional bodies, depending on provincial/regional regulation. See *CPA student*.

CPA certification program:
All elements of the CPA program required for certification, including academic prerequisites, the CPA Professional Education Program, the Common Final Examination, and qualifying practical experience.

CPA competency Map:
The CPA publication that profiles the competencies required of a CPA on the path to, and upon, certification. The competency statements and defined proficiency levels for practical experience are modified from those in the *CPA Competency Map*. These adjustments were made to reflect what CPA students/ candidates are expected to demonstrate through practical experience.

CPA experience verification:
The CPA practical experience model in which commences when CPA students/ candidates are employed in any position that allows them to gain experience in at least one sub-competency area at least Level 1 proficiency. The experience is approved by a provincial/regional body as the experience is gained.

CPA pre-approved program:
Programs offered by employers that allow CPA students/candidates to satisfy all of the practical experience requirements within the required minimum term of practical experience. Pre-approved programs are monitored by the profession to ensure the approved training program is being followed.

CPA review
For purposes of practical experience, CPA review includes CPA students/ candidates performing self-assessments of the level of proficiency developed for each competency area, and a provincial/regional body assessing the experience of CPA students/candidates. The CPA review is called "Assessment" in the CPA PER. See also *Reporting*, *Competency area* and *Proficiency level*.

CPA student:
Individuals registered with a provincial/regional body and working towards prerequisites for admission to CPA PEP — either in CPA preparatory courses or in recognized courses and programs offered by post-secondary institutions.

Note that the term "student" may be used by provincial/regional bodies to refer to CPA candidates, depending on provincial/regional regulation. See *CPA candidate*.

Depth:
The requirement for CPA students/candidates to gain proficiency in all technical competency sub-areas relating to one competency area, with at least two competency sub-areas being at Level 2 proficiency. The remaining competency sub-areas need to be at least at Level 1 proficiency. See also *Breadth, Core, Competency sub-area and competency statements*.

Enabling competencies:
The essential skills for ethical behaviour, decision making, problem-solving, communication, and leadership required of a professional accountant. See also *Competency area*, the *CPA Competency Map*, and *Technical competencies*.

Foundational level:
An employment position in which the majority of technical proficiency is at Level 0, with only one competency sub-area at Level 1 proficiency.

Mentor:
A CPA, or another individual otherwise approved by a provincial/regional body under the requirements contained in the CPA PER, who provides guidance to CPA students/candidates on competency development, and who models and facilitates the understanding of the CPA profession's values, ethics and attitudes.

Practical experience reporting tool (PERT):
The online tool for CPA students/candidates to report their practical experience. PERT is used in all provinces/regions, with the exception of Quebec.

Pre-approved program leader:
The senior CPA responsible for an office's preapproved program(s). This individual is sufficiently senior to adjust the duties of CPA students/candidates to provide opportunities to obtain the technical and enabling competencies required of the training program. See also *CPA pre-approved program*, *Mentor* and *Supervisor*

Proficiency level:
At the point of certification, CPA students/candidates are expected to demonstrate competence (a combination of attitude, skill, and knowledge) at defined levels of proficiency. Three distinct and progressively higher levels of proficiency are described, reflecting the increase in the ability of CPA students/candidates throughout the program. Complexity,

circumstance, and autonomy are considered in determining proficiency levels. Generally, as complexity increases and/or routine work decreases and/or autonomy increases, the proficiency level increases.

There are three levels of proficiency:
1. **Level 0** — Experience that is at an administrative or clerical level.
2. **Level 1** — Experience that is at the professional level but lower than that expected of a newly certified CPA. This can include experience with tasks that are routine in nature, of a low level of complexity, and/or are executed with little autonomy.
1. **Level 2** — The experience level expected of a newly certified CPA. See also *Autonomy*, *Circumstance*, and *Complexity*.

Provincial/regional body:
A professional accounting body that is a member of CPA Canada.

Reporting:
CPA students/candidates are required to capture all practical experience in experience reports. The reports contain factual information such as the type of experience being obtained (through experience verification or through a pre-approved program) and duration, as well as an assessment of the experience.

Secondment:
Qualifying experience obtained outside of the pre-approved program that does not require CPA students/candidates to switch to experience-verification.

Self-employed:
Individuals who work under contract or in a consultative capacity for someone other than themselves are not considered to be self-employed.

Supervisor:
The person to whom CPA students/candidates report. In experience verification, the supervisor verifies that the experiences of CPA students/candidates are appropriately reflected in experience reports. In pre-approved programs the supervisor assigns work according to the program. Ideally, the supervisor is also a professional accountant. See also *Mentor*.

Technical competencies:
The abilities expected of professional accountants and performed by professional accountants in many roles in public practice, industry, and the public sector. For purposes of practical experience, the required technical competencies have depth, breadth and core proficiency standards. See also *Competency area*, *CPA Competency Map*, *Depth*, *Breadth*, *Core* and *Enabling competencies*.

Appendix

Below are definitions of the fields and terms you will see throughout PERT. For the purposes of this appendix, we will refer to both candidates and students as 'future CPA's'.

Future CPA's Profile

The profile contains your personal information. Only you can view your profile, although some information is displayed in other areas.

Your *Profile* page will display the following:

CPA Number	The unique identifier for every individual registered with a provincial/regional CPA body.
First Name	Your first name
Last Name	Your last name
Governing Body	The provincial/regional CPA body that you are registered with.
Email	The email that the provincial/regional CPA body will use to contact you.
Business Phone Number	The phone number that the provincial/regional CPA body will use to contact you.
Personal Phone Number	The additional phone number that the provincial/regional CPA body will use to contact you.
Experience Route	This is the "route" you are reporting experience through. • **Pre-Approved Program Route (PPR):** Working within a pre-approved program where your employer ensures exposure to all the required experience. • **Experience Verification Route (EVR):** Not employed in a pre-approved program, this self-directed, flexible route has more touchpoints. • **Unemployed:** Unemployed, or not employed in a qualifying role.
Language Preference	Your preferred language of communication (English or Français).
Organization	The organization that you are employed with. This is only visible if your Experience Route is Pre-approved Program.
Location	The location of your workplace. This is only visible if your Experience Route is Pre-approved Program.

Program	The pre-approved program in which you are enrolled.
	This is only visible if your Experience Route is Pre-approved Program.
Mentor	The CPA who is supporting you throughout your practical experience.
	A mentor is required before you can get a PER Start date.
Mentor Email	The contact email for your mentor. this must match the email address listed in your mentor's profile.
Next Experience Report Date	The date displayed triggers a notification reminder to document your experience.
	Once you have completed your first report, you will be prompted to enter your preferred date for your next reminder.
	Note: you are required to report experience semi-annually.

Future CPA's Home

The future CPA's *Home* page displays any upcoming or outstanding action items and an overview of what requirements have been reported.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The future CPA's *Home* page will display the following:

Reporting Status	Indicates the future CPA's current status in fulfilling the practical experience requirements.
	• **Pre-assessment Required**: Current employment has not yet been approved for reporting.
	• **Pending Enrolment**: Currently awaiting employment confirmation-from their program manager.
	• **In Progress**: Qualifying employment has been approved. Experience reporting can begin if a mentor's name has been included in the profile.
	• **Unemployed**: Currently unemployed or not employed in a qualifying role.
	• **PER Standard Met**: Future CPA has met all the practical experience requirements.
PER Start Date	The date set once the future CPA is approved for reporting and have added their mentor. Once this date is set, reporting can begin.
Experience Route	This is the "route" the future CPA is reporting experience through.
	• **Pre-Approved Program Route (PPR):** Working within a pre-approved program where the employer ensures exposure to all the required experience.
	• **Experience Verification Route (EVR):** Not employed in a pre-approved program, this self-directed, flexible route has more touchpoints.
	• **Unemployed:** Unemployed, or not employed in aqualifying role.

Mentor	The CPA who is supporting the future CPA throughout their practical experience. A mentor is required before the future CPA can get a PER Start date.
Next CPA Review Date	Either displays a specific date or "Upon Completion". • **Date** displays the next scheduled date experience reports are required to be sent to the provincial/regional CPA body for CPA Review. • **Upon Completion** means a CPA Review is only required when Core/Breadth/Depth, Enabling and Duration are all reported as "Met". A CPA Review is also required if the future CPA changes jobs.
Next Experience Report Date	The date displayed triggers a notification reminder for the future CPA to document their experience. Once they have completed their first report, they will be prompted to enter a preferred date for their next reminder. **Note**: future CPA's are required to report experience semi-annually.
Action Item	Displays any upcoming or outstanding action items that a future CPA is required to complete as part of the practical experience reporting process. Each action item has a GET STARTED button. Click on this button to proceed onto the next step (only Future CPA's can complete their action items). Penalties may apply if items are not completed.
Total Eligible Duration	This is a calculation of all qualifying duration reported and eligible to be recognized.
Competency Requirements	This is a display of each competency (Technical – Core, Depth and Breadth, and Enabling) and whether it has been reported as "met" or "not met".

Experience Reports

The future CPA's *Experience Reports* page displays a list of all experience reports.

These experience reports are how a future CPA documents their development toward the required practical experience competencies. The provincial/regional CPA body will review these reports and determine whether the practical experience requirements have been met.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *Experience Reports* page will display the following:

Report Status	Indicates the current status of the experience report. • **New:** Future CPA has created the report but has not completed it. • **Complete:** Future CPA has completed their report and is ready for supervisor verification. • **Follow-up:** Indicates that an update/correction needs to be made. • **Verification Requested:** The report has been sent to the supervisor to verify the factual accuracy of the experience reported." • **Admin Assess:** An exception has occurred. The PERT administrator will assess it to determine what is needed. • **Verified:** The report has been verified and is ready to be sent for CPA Review if due. • **Reviewed:** The CPA reviewer has reviewed this report. It cannot be edited any further.
Report Type	Indicates what type of experience is being reported: • **Current Experience:** Experience obtained after the PER Start Date. • **Prior EV:** Experience obtained before the PER Start Date gained in the Experience Verification Route. • **Prior PPR:** Experience obtained before the PER Start Date gained in the pre-approved program route. • **Catch up:** An exception report should be used only if instructed to by the provincial/regional CPA body.
Report Period	This indicates the time period this report covers. Experience reported should have been obtained during this report period. The report period calculates towards the duration requirement.
Employer	Displays the employer of the future CPA from the report period.
Position	Displays the position (job title) of the future CPA from the report period.
View	Click on this button to view the experience reported.

Inside an Experience Report

On the *Experience Reports* page, clicking to view an experience report will open to the *Report Details*. You will see there are six sections to an experience report in New or Follow-up status. There are five sections to an experience report in any other status.

These sections are all visible to the future CPA's as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The Progress Bar displays which section of the Experience Report you are in. There are two ways to navigate through the experience report:

1. Click the heading in the progress bar to be taken to that section

2. Click Save and Continue at the bottom of the screen navigate to the next section.

The sections contain the following:

Report Details	Contains the overall details of the experience report
	(for example, the employment information and supervisor information).
	On this page for experience reports in new or follow-up status, a future CPA can: • **Edit** • **Save & Exit** • **Save & Continue**
	For experience reports that are not in new or follow-up status, a future CPA can: • **Re-open** • **Delete** • **Send to supervisor:** if the experience report is for EVR and in a complete status. • **Cancel sent to supervisor:** if the experience report is in a verification requested status. • **Copy:** if the experience report is in verified or reviewed status. • **Print:** Using this function will display all sections of the report on one page.

Technical Competencies	Contains a list of each technical competency.
	PPR
	• **Competency Area:** Clicking on each competency area or the + will direct you to the sub-competency details for that competency area.
	• **Your Sub-Competencies:** Indicates which sub- competencies have been reported and/or verified (if required).
	EVR:
	• At the top of the page, a table will display with guiding questions.
	• If you would like help identifying the areas you should report under, answer the guiding questions yes or no. The sub-competencies will be displayed below the table based on your responses.
	Clicking on the competency area is how the future CPA reports their experience within each sub-competency. Supporters can also click into each competency area or the + and view the reported experience.
	Note: the (?) contains more information about the terms and guiding questions to help the future CPA know which technical competency to report against in relation to their job.
Enabling Competencies	Contains a list of each enabling competency.
	• **Enabling competency:** Clicking on each question or the + will direct you to the details for that question.
	• **Answered:** A check mark will indicate which question contains an answer.
	• **Self-assessed proficiency:** displays the self-assessed proficiency if the future CPA has entered one.
	• **CPA reviewed proficiency:** displays the CPA reviewed proficiency if the report has been reviewed. The CPA reviewed proficiency over-rides the self-assessed proficiency.
	Summary Questions are also required if any enabling competency question has been answered.
	• **Summary question:** Clicking on each question or the + will direct you to the details for that question.
	• **Answered:** A check mark will indicate which question contains an answer.
	Clicking on each question is how the future CPA answers them. Supporters can also click into each question or the + and view the reported experience.
	Note: the (?) contains supporting information to help the future CPA answer the enabling competency questions
Notes	Here you can view any Notes that have been entered.
Attachments	Here you can view and/or attach any attachments on this report.
Summary	Only displayed if the experience report is in New or Follow-up status.
	On this page future CPA's can:
	• Back: Go to the previous section
	• Print: Using this function will display all sections of the report on one page.
	• Delete
	• Complete

Consolidated Summary

The future *CPA's Consolidated Summary* page displays a list of all experience reports. Here you can consolidate all experience reports to see a full summary of what has been reported.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

Select the specific experience reports or select all and click **VIEW SUMMARY**. The future CPA's *Consolidated Summary* page will display the following:

Mentor Meetings

The future CPA's *Mentor Meetings* page displays a list of all mentor meetings.

This is how future CPA's and mentors document their meetings (which are required semi-annually when future CPA's update their experience reports).

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *Mentor Meetings* page will display the following:

Status	Indicates the current status of the mentor meeting: • **Requested:** indicates that a meeting has been requested, but not yet completed. The mentor is responsible for completing this. • **Completed:** indicates that this meeting has been completed. No edits can be made. • **Cancelled:** indicates that this meeting has been cancelled. No edits can be made.
Meeting date	Indicates the date this meeting took place. The mentor will enter a date when completing the meeting. It may be blank if the meeting took place before 2019.
Mentor	This indicates the mentor who completed this meeting.
View	Click on this button to view the details of the meeting.

Mentor Meeting Details

On the *Mentor Meetings* page, clicking to view a mentor meeting will open it and display the details.

Mentor meeting details are visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *Mentor Meetings* page will display the following:

Mentor	This indicates the mentor who completed this meeting.
Meeting Status	Indicates the current status of the mentor meeting: • **Requested:** indicates that a meeting has been requested, but not yet completed. The mentor is responsible for completing this. • **Completed:** indicates that this meeting has been completed. No edits can be made. • **Cancelled:** indicates that this meeting has been cancelled. No edits can be made.
Meeting date	Indicates the date this meeting took place. The mentor will enter a date when completing the meeting. It may be blank if the meeting took place before 2019.
Meeting Statements	These statements along with the comments, provide a quick over-view of what was discussed in the meeting and whether the future CPA is on track with their reporting.
Comments	These comments along with the meeting statements, provide a quick overview of what was discussed in the meeting and whether the future CPA is on track with their reporting.
CANCEL (BUTTON)	If the meeting is in a Requested status, the future CPA and mentor can cancel it to indicate the meeting never took place.

CPA Reviews

The future CPA's *CPA Reviews* page displays a list of all CPA Reviews.

Future CPA's request a CPA Review of their experience report(s) to get their experience recognized by their provincial/regional CPA body.

During a CPA Review, the self-assessed proficiency and details within each experience report will be assessed to determine whether they have been reported accurately and/or the practical experience requirements have been met.

This page is visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The *CPA Reviews* page will display the following:

Requested	This indicates the date the future CPA originally requested the CPA Review.
Completed	This indicates the date the CPA Review was completed. If it has not yet been completed, this will be blank.
Status	Indicates the current status of the CPA Review: • **Data Check:** The CPA Review requires program manager verification. • **Certification Requested:** The CPA Review requires program leader certification. • **Assessment Requested:** The CPA Review is with the provincial/ regional CPA body but has yet to be assigned to a CPA Reviewer. • **Required:** The CPA Review has been assigned to a CPA reviewer. • **Follow-up:** The CPA reviewer has requested additional information before they can complete the CPA Review. Once changes have been made (and the experience reports are back in verified status), the CPA Review needs to be re-submitted. • **Completed:** The CPA Review is complete. • **Cancelled:** The CPA Review has been cancelled.
View	Click on this button to view the details of the CPA Review. Here a future CPA can view any comments provided and program managers/program leaders can verify/certify the CPA Review.

CPA Review Details

On the CPA Reviews page, clicking to view a CPA Review will open it and display the details.

CPA Review details are visible to the future CPA as well as any supporter (program manager, program leader and/or mentor) who is connected to them.

The CPA Review will display the following:

Type	There are two types of CPA Reviews: • Pre-assessment: This is used when a future CPA in EVR needs to have their employment assessed and determined that they are in a qualifying role. (PPRs do not require a pre-assessment). • Assessment: Any other time a future CPA requests a CPA Review, this is to have their experience assessed.
Review Reason	There are five reasons why a future CPA would need a CPA Review: • **12-Month Assessment: A requirement for EVR only**. After 12 months of experience, the CPA Reviewer will check the future CPA's experience and identify whether they are on-track. • **Change of Job Assessment:** Required for any future CPA changing jobs while reporting practical experience. • **Completion Assessment:** This should only be used if all the PER requirements have been met. • **Student Requested:** Optional. At any time, future CPA's can request a CPA Review to check whether they are on-track (additional details are required to identify why the future CPA is requesting the CPA Review). • **Profession Requested:** The CPA reviewer will have specifically requested for the future CPA to use this reason.
Status	Indicates the current status of the CPA Review: • **Data Check:** The CPA Review requires program manager verification. • **Certification Requested:** The CPA Review requires program leader certification. • **Assessment Requested:** The CPA Review is with the provincial/ regional CPA body but has yet to be assigned to a CPA Reviewer. • **Required:** The CPA Review has been assigned to a CPA reviewer. • **Follow-up:** The CPA reviewer has requested additional information before they can complete the CPA Review. Once changes have been made, the CPA Review needs to be re-submitted. • **Completed:** The CPA Review is complete. • **Cancelled:** The CPA Review has been cancelled.
Date Created	This indicates the date the future CPA originally requested the CPA Review.
Program Manager Comments	This displays any comments provided by the program manager provided during their verification. This will be blank if program manager verification is not required.
Program Leader Comments	This displays any comments provided by the program leader during their certification. This will be blank if program leader certification is not required.

CPA Review Comments	This displays the overall comments left by the CPA Reviewer.
View CPA Review Summary	For CPA Reviews in Follow-up or Completed status, this displays a summary of the comments left by the CPA Reviewer on the technical and enabling competencies.
CPA Administrators Only	This section is for administrative purposes and only displays for future CPA's in **PPR**. Future CPA's in EVR will not see this section. • **Date/Leave Declaration:** Displays whether the program leader has agreed or disagreed to the Future CPA's reported dates (and leave). • **Mentor Meeting Declaration:** Displays whether the program leader has agreed or disagreed to the Future CPA meeting their mentor meeting requirement. • **Mentor Review Declaration Other Comments: Displays comments on why program leader disagreed to the Mentor Meeting Declaration .** • **Charge Hours Declaration: Displays whether the program leader has agreed or disagreed to the chargeable hours .** • **All 30 month Declaration:** Displays "agree" if the program leader confirms that the Future CPA has spent all 30 months within their program. • **Not all 30 month Declaration:** Displays "agree" if the Future CPA has not completed all 30 months within their program, but the requirements show as met (if the Future CPA was integrated into a program). • **Departed Declaration:** Displays "agree" if the program leader confirms that while the Future CPA has correctly reported and are leaving the program, they have not completed the requirements (if the Future CPA departs a program before completing). • **Certified By:** will display the program leader name.